Angus Council

STEAM Tourism Economic Impacts
2020 Year in Review

The Visitor Economy of Angus

This is a summary of the annual tourism economic impact research undertaken for Angus Council for the calendar year 2020, with comparisons to 2019. For context, trends from 2009-2020 are also shown. Outputs in this report have been generated using STEAM, the tourism specific economic impact model, owned and operated by Global Tourism Solutions (UK) Ltd.

Due to the significant disruption to the visitor economy caused by the COVID-19 pandemic, outputs for 2020 are not reflective of usual economic outputs for the area.

2020

325k visits to Angus in 2020

165k visits were made by visitors staying in Angus as part of a holiday or short break, generating 700k nights in local accommodation

859k Visitor Days and Nights Spent in Angus in 2020

Tourism visits to Angus supported 1,802 full time equivalent jobs in 2020

On average, staying visitors spend 4.2 nights in Angus, spending a total of £11.29m on local accommodation

160k visits were made by day visitors to Angus

Staying visitors generated a total economic value locally of £87m in 2020

Day visitors generated a total economic value locally of £8.8m in 2020

A total of £96m was generated within the local economy through visitor and tourism business expenditure

The COVID-19 pandemic had far reaching effects on all parts of the visitor economy and supporting services

Trends 2019-2020

Economic Impact	Visitor Nos	Visitor Days
-60.1%	-69.8%	-65.9%

2020

Visitor Types

Staying Visitors encompass all tourists staying overnight for at least one night in one of the following types of accommodation:

- **Serviced Accommodation** - including Hotels, Guest Houses, B&Bs, Inns
- **Non-Serviced Accommodation** – including Self-Catering properties such as Houses, Cottages, Chalets and Flats, as well as Camping and Caravanning, Hostels and University / College accommodation
- **Staying with Friends and Relatives (SFR)** – unpaid overnight accommodation with local residents

Day Visitors visiting the area on a non-routine and non-regular leisure day trip from a home or holiday base

Staying Visitors
51% of Visits

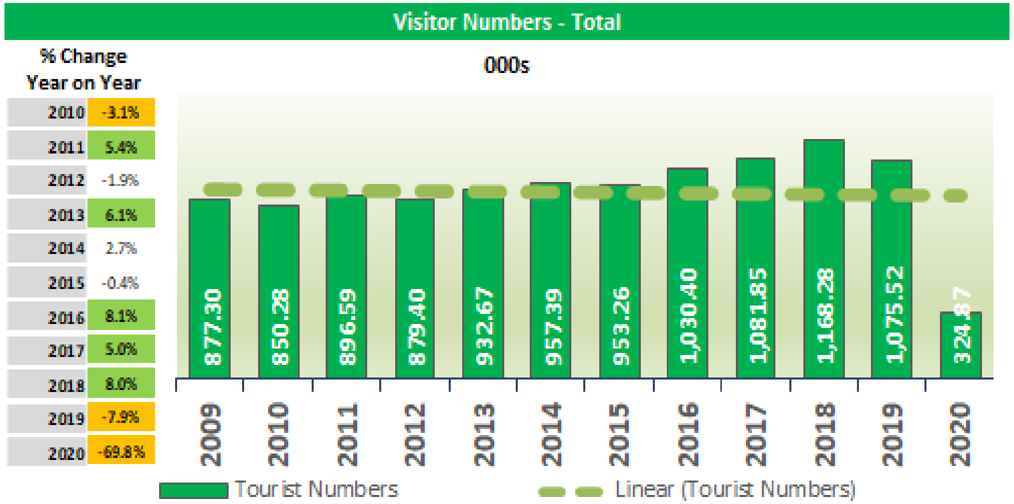
Day Visitors
49% of Visits

Tourism Visits

In 2020, Angus received 324,870 tourism visits

There were an estimated 324,870 tourism visits to Angus in 2020, down 69.8% on the previous year. Between 2009 and 2019 the area had seen the total number of visits by rise by 22.6% to a total of 1.1m visits. The significant drop off in trade, accounted for by the COVID-19 pandemic, affected all parts of the visitor economy, with the area's day visits suffering the largest fall in trade (-74.3%) between 2019 and 2020, followed by non-serviced accommodation (-67.0%) and serviced accommodation sectors (-64.7%).

Day visitors accounted for 49% of all visits made to the area in 2020; since 2009, this sector would have usually accounted for around 60% of all visits. All sectors saw dramatic reductions in numbers during the second quarter, when lockdowns were introduced. While both the day visitor and serviced accommodation sector continued to struggle throughout the rest of the year, the non-serviced accommodation sector did partially recover, but total visitor numbers again reduced in all sectors in the fourth quarter as restrictions were re-introduced.



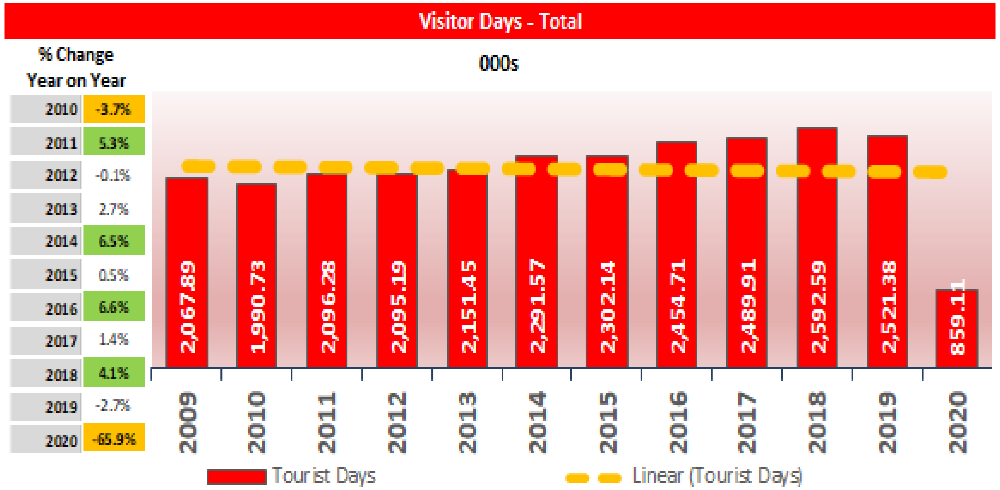
Key Figures: Visitor Numbers: 2020

Visitor Numbers		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2020 (thousands)	**000s**	**49.44**	**54.63**	**61.26**	**165.33**	**159.54**	**324.87**
2019 (thousands)	000s	139.97	165.78	150.07	455.82	619.70	1.075.52
Change 19/20 (%)	**%**	**-64.7**	**-67.0**	**-59.2**	**-63.7**	**-74.3**	**-69.8**
Share of Total (%)	%	15	17	19	51	49	100.0

Visitor Days and Nights *In 2020, visitors generated 859,110 days and nights spent locally*

Visitor Days take into account those visitors who stay at any destination for more than a day. For example, if a family of five stay three nights, they will not only account for five visitors, but also fifteen visitor days.

Despite the significant challenges posed by the COVID-19 pandemic, 859,110 visitor days were spent in Angus in 2020 (2.52m were spent in 2019). Staying visitors to Angus generated 699,570 days in the area, and day visitors spent an additional 159,540 tourism day visits to the area during 2020. The effect of the pandemic on visiting behaviour and operating conditions meant that many visitor facilities were closed for significant periods and events and activities that would ordinary happen did not occur. A host of businesses which would ordinarily be bringing visitors into Angus were not able to do so, due to restrictions that were in place for much of the year. As a result, overall visitor days were down significantly by 65.9% for the year.



Key Figures: Visitor Days: 2020

Visitor Days		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2020 (thousands)	**000s**	**108.96**	**322.45**	**268.16**	**699.57**	**159.54**	**859.11**
2019 (thousands)	000s	307.78	912.48	681.42	1,901.68	619.70	2,521.38
Change 19/20 (%)	**%**	**-64.6**	**-64.7**	**-60.6**	**-63.2**	**-74.3**	**-65.9**
Share of Total (%)	%	13	37	31	81	19	100

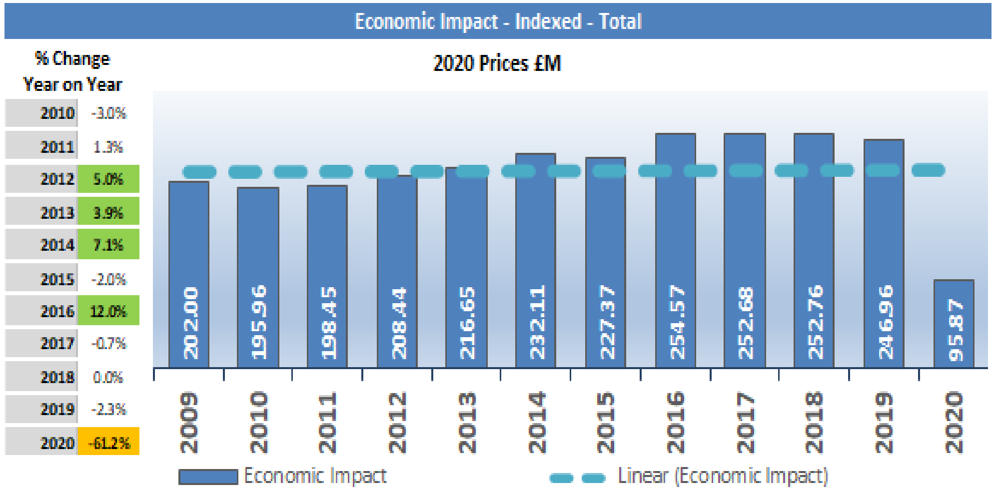
Average length of stay in days for different visitor types to Angus in 2020

Day Visitors	All Visitors	Serviced Accommodation	Non-Serviced Accommodation	Staying with Friends/Relatives	All Staying Visitors
1	2.6	2.2	5.9	4.4	4.2

Total Economic Value *In 2020, the visitor economy was worth a total of £95.87m*

The value of tourism activity in Angus was estimated to be £202m in 2009. By 2019, the annual value of tourism activity had grown by 22.3% to £247m (all monetary figures in this narrative report are indexed, unless stated, to allow direct comparison). Between 2019 and 2020, however, tourism activity in Angus was substantially affected by the COVID-19 pandemic and as such, the economic impact of tourism was estimated to have fallen substantially by -60.1% to a figure of £95.87m.

The total economic impact in 2020 comprised the expenditure of visitors on goods and services, totalling £68.55m, and the *indirect* and *induced* economic effects of local businesses and residents spending tourism revenues locally, accounting for a further £27.33m. The economic impact was especially noticeable within day visitors, which saw a drop of 76.4% on the previous year, resulting in a loss of £28.5m in a sector that makes up almost half of all visitors to the area.



Key Figures: Economic Impact: 2020

Economic Impact		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2020 (£ Millions)	**£M**	**15.18**	**48.79**	**23.12**	**87.09**	**8.781**	**95.87**
2019 (£ Millions)	£M	41.08	110.22	51.397	230.27	37.23	240.50
Change 19/20 (%)	**%**	**-63.1**	**-55.7**	**-55.5**	**-57.2**	**-76.4**	**-60.1**
Share of Total (%)	%	16	51	24	91	9	100

Average economic impact generated per person by each type of visitor to Angus in 2020

Day Visitors
£55 per Day

Staying with Friends and Relatives
£86 per Day
£380 per Visit

All Visitors
£112 per Day
£290 per Visit

Non-Serviced Accommodation
£152 per Day
£894 per Visit

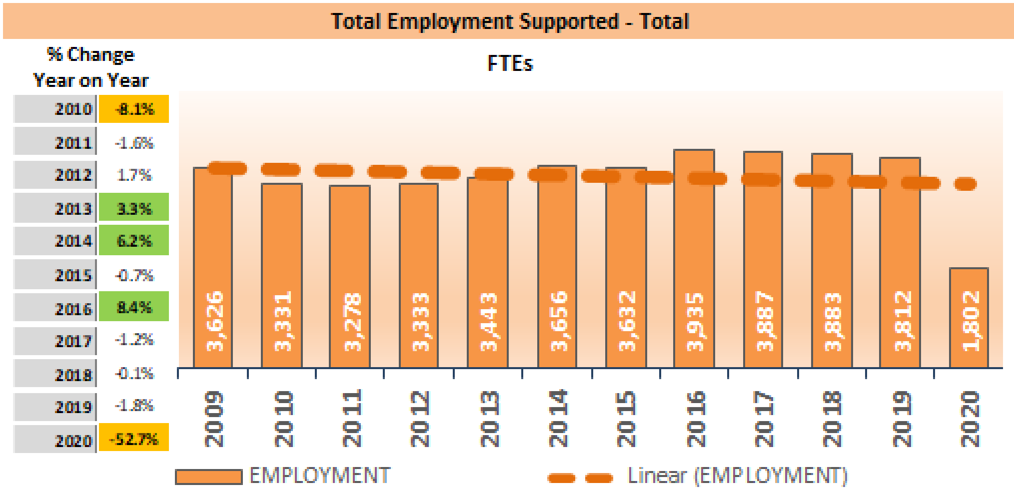
All Staying Visitors
£125 per Day
£523 per Visit

Serviced Accommodation
£139 per Day
£306 per Visit

Employment Supported *In 2020, the visitor economy supported 1,802 Full Time Equivalent jobs*

The expenditure and activity of visitors to Angus supported a total of 1,802 Full-Time Equivalent jobs (FTEs) in 2020. This represented a drop of -52.7% from a total of 3,812 FTEs in 2019. Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 1,395 FTEs, and a further 407 indirect and induced jobs supported through local businesses.

The furlough scheme was an important employment support mechanism for the visitor economy during the pandemic. FTEs supported by the scheme are not included in the STEAM estimated employment totals for 2020 as they were not directly or indirectly supported by the activity of visitors, but rather through government subsidy. Survey data for UK visitor destinations suggests relatively low incidence of redundancy, due to the presence of the furlough scheme although it is important to note that not all sectors / employment would have been supported by the scheme.



Key Figures: Employment: 2020

Employment Supported by Sector 2020	Direct Visitor Employment						Indirect and Induced	Total
	Accommodation	Food & Drink	Recreation	Shopping	Transport	Total Direct		
Totals	549	266	80	249	251	1,395	407	1,802

Definitions:

- **Accommodation:** Payments for overnight stays in accommodation, such as room rates for serviced accommodation, or pitch fees and hire charges for non-serviced accommodation.
- **Recreation:** Covering expenditure on a wide range of leisure activities such as museum, event, concert / theatre and attractions attendance as well as sports participation and spectating.
- **Transport:** Expenditure within the destination on travel, including fuel and public transport tickets.
- **Food and Drink:** Spend on eating and drinking at restaurants, cafes and other venues, takeaway food, snacks and groceries.
- **Shopping:** What visitors spend on items including clothing / jewellery, household items, music / films / games, gifts and smaller items, books and maps, plants and garden items.
- **Indirect:** The expenditure by local tourism businesses within the local supply chain.

Richard J MacDonald
Director (Scotland)
GTS (UK) Ltd
richard.m@gtsuk.co.uk
2021

STEAM Comparative Headlines: 2019 and 2020

Due to the significant disruption to the visitor economy caused by the COVID-19 pandemic, outputs for 2020 are not reflective of usual economic outputs for the area.

STEAM FINAL TREND REPORT FOR 2009-2020 ANGUS COUNCIL	Comparing 2020 and 2019 All £'s Historic Prices	COMPARATIVE HEADLINES

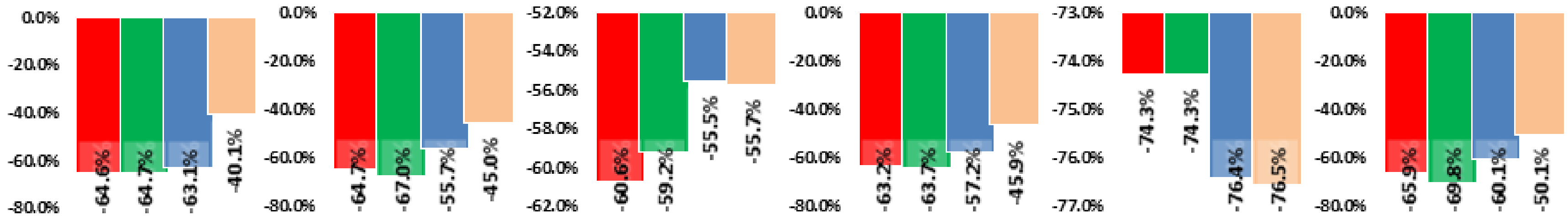
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2020 & 2019 - IN HISTORIC PRICES

KEY		Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
An increase of 3% or more		Serviced			Non-Serviced														
Less than 3% change		2020	2019	+/- %	2020	2019	+/- %	2020	2019	+/- %	2020	2019	+/- %	2020	2019	+/- %	2020	2019	+/- %
A Fall of 3% or more																			
Visitor Days	000s	108.96	307.78	-64.6%	322.45	912.48	-64.7%	268.16	681.42	-60.6%	699.57	1,901.68	-63.2%	159.54	619.70	-74.3%	859.11	2,521.38	-65.9%
Visitor Numbers	000s	49.44	139.97	-64.7%	54.63	165.78	-67.0%	61.26	150.07	-59.2%	165.33	455.82	-63.7%	159.54	619.70	-74.3%	324.87	1,075.52	-69.8%
Direct Expenditure	£M																68.55	171.50	-60.0%
Economic Impact	£M	15.18	41.08	-63.1%	48.79	110.22	-55.7%	23.12	51.97	-55.5%	87.09	203.27	-57.2%	8.781	37.23	-76.4%	95.87	240.50	-60.1%
Direct Employment	FTEs	428	714	-40.1%	641	1,165	-45.0%	236	533	-55.7%	1,304	2,411	-45.9%	90	385	-76.5%	1,395	2,796	-50.1%
Total Employment	FTEs																1,802	3,812	-52.7%

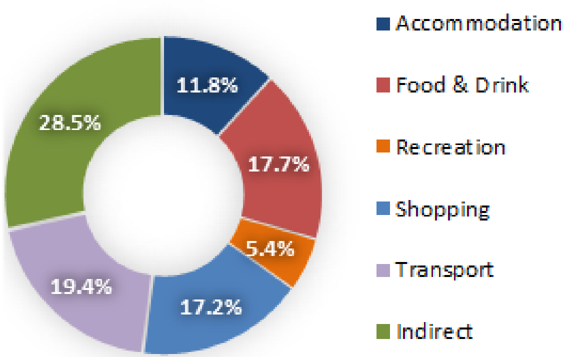
PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2020 & 2019 - IN HISTORIC PRICES

KEY

- Visitor Days
- Visitor Numbers
- Total Economic Impact
- Direct Employment

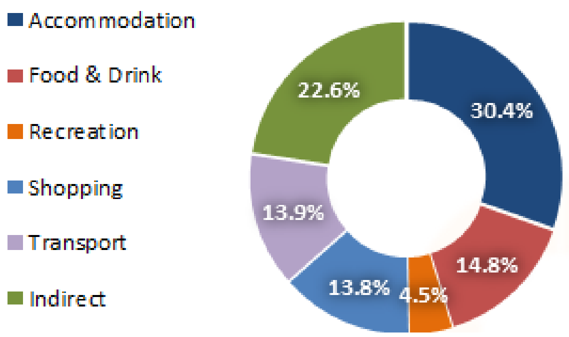


Sectoral Distribution of Economic Impact - £M including VAT in Historic Prices



Sectoral Distribution of Employment - FTEs

Economic Impact 2020	Economic Impact 2019	+/- %	Sectors	Employment 2020	Employment 2019	+/- %
11.29	30.32	-62.8%	Accommodation	549	735	-25.3%
16.98	41.57	-59.2%	Food & Drink	266	644	-58.7%
5.150	12.67	-59.4%	Recreation	80	195	-58.9%
16.50	40.92	-59.7%	Shopping	249	610	-59.2%
18.63	46.01	-59.5%	Transport	251	612	-59.0%
68.55	171.50	-60.0%	TOTAL DIRECT	1,395	2,796	-50.1%
27.33	69.00	-60.4%	Indirect	407	1,016	-59.9%
95.87	240.50	-60.1%	TOTAL	1,802	3,812	-52.7%



STEAM Comparative Headlines: 2009 to 2019

Outputs for the period to 2019 show recent performance levels in Angus prior to the COVID-19 pandemic.

STEAM FINAL TREND REPORT FOR 2009-2020 ANGUS COUNCIL	Comparing 2019 and 2009 2009 in 2019 prices (1.347)	COMPARATIVE HEADLINES

KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2019 & 2009 - INDEXED TO 2019

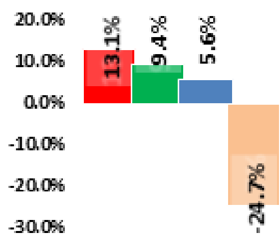
KEY
- An increase of 3% or more
- Less than 3% change
- A Fall of 3% or more

		Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
		Serviced			Non-Serviced														
		2019	2009	+/- %	2019	2009	+/- %	2019	2009	+/- %	2019	2009	+/- %	2019	2009	+/- %	2019	2009	+/- %
Visitor Days	M	0.308	0.272	13.1%	0.912	0.650	40.3%	0.681	0.629	8.4%	1.902	1.551	22.6%	0.620	0.517	19.9%	2.521	2.068	21.9%
Visitor Numbers	M	0.140	0.128	9.4%	0.166	0.094	75.8%	0.150	0.138	8.4%	0.456	0.361	26.4%	0.620	0.517	19.9%	1.076	0.877	22.6%
Direct Expenditure	£M																171.50	141.80	20.9%
Economic Impact	£M	41.08	38.91	5.6%	110.22	78.86	39.8%	51.97	48.48	7.2%	203.27	166.25	22.3%	37.23	30.46	22.2%	240.50	196.71	22.3%
Direct Employment	FTEs	714	947	-24.7%	1,165	981	18.7%	533	521	2.3%	2,411	2,449	-1.5%	385	330	16.7%	2,796	2,779	0.6%
Total Employment	FTEs																3,812	3,626	5.1%

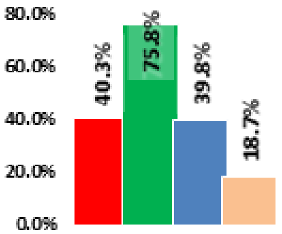
PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2019 & 2009 - INDEXED TO 2019

KEY
- Visitor Days
- Visitor Numbers
- Total Economic Impact
- Direct Employment

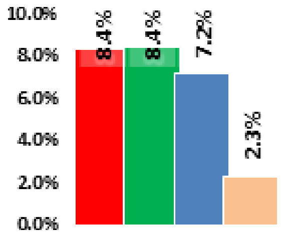
Serviced



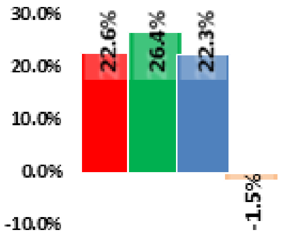
Non-Serviced



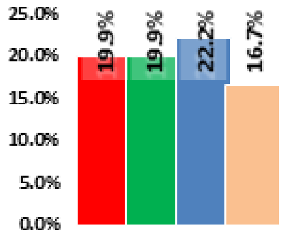
SFR



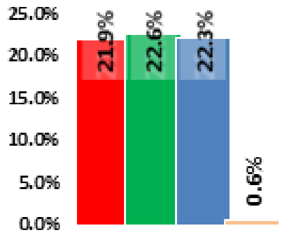
All Staying Visitors



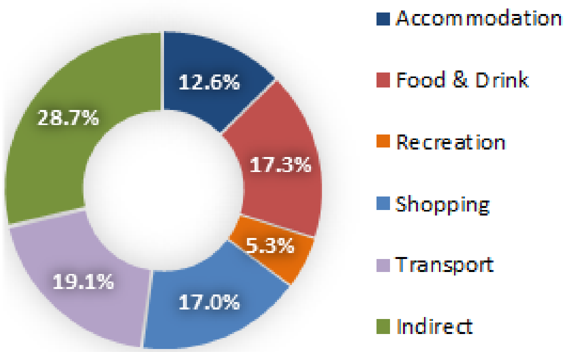
Day Visitors



All Visitor Types



Sectoral Distribution of Economic Impact - £M including VAT Indexed to 2019



Economic Impact 2019	Economic Impact 2009	+/- %	Sectors	Employment 2019	Employment 2009	+/- %
30.32	21.14	43.4%	Accommodation	735	934	-21.4%
41.57	35.81	16.1%	Food & Drink	644	581	10.8%
12.67	10.35	22.4%	Recreation	195	167	16.8%
40.92	34.61	18.2%	Shopping	610	541	12.9%
46.01	39.89	15.4%	Transport	612	556	10.1%
171.50	141.80	20.9%	TOTAL DIRECT	2,796	2,779	0.6%
69.00	54.92	25.6%	Indirect	1,016	847	19.9%
240.50	196.71	22.3%	TOTAL	3,812	3,626	5.1%

Sectoral Distribution of Employment - FTEs